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NEW MEMBER ORIENTATION

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Hit the Ground Running:
Hiring Staff & Setting Up Your Office

Tuesday, November 10, 2020
10 a.m.



DISTRICT OFFICE LOCATION & LEASING

Encouraged to have an office in your district for constituents

Private Lease between member & landlord – House is NOT a party to the lease

GENERAL COUNSEL	HOUSE IT	HOUSE ADMIN.	SERGEANT	CLERK
Review of lease as a courtesy	EvolvTec (vendor) – delivery & set-up of multi-function equipment Internet connection	Administer telephone set-up Purchase of flags Office Depot cards	Armstrong & Suddath (vendor) – delivery & set-up of furniture package	Photographs Administers stationary & business cards



PURCHASING

- Office Supplies - Legislature has a contract with Office Depot
 - Online portal of acceptable items at a negotiated price
 - Also have an emergency purchase store card
- Purchases are deducted from the member's following monthly IDA allotment
- Items purchased or reimbursed from IDA account become state property and will be returned to the House at the end of the member's term



DISTRICT OFFICE STAFFING

One Legislative Assistant

- Supervises the office staff

- Typically the designated district staff traveling to Tallahassee for session

- Handles constituent issues

- Attends functions & meetings

- Manages district office accounts

- Performs bill research

DLA - minimum requirements: bachelor's degree & 1 year admin. experience



DISTRICT OFFICE STAFFING

One District Executive Secretary

- Maintains member's schedule

- Receives phone calls

- Prepares routine correspondence and routine constituent inquiries

- Arranges travel plans

- Maintains office files and office supplies

DES – minimum requirements: high school diploma & 2 yrs. Sec/clerical work experience



DISTRICT OFFICE STAFFING

- Set salary schedule. If no prior Florida legislative experience, the employee starts at the minimum salary for that classification
- Certain districts have competitive area differentials and wage supplements due to the cost of living
- Must have a complete legislative application before Admin. can determine the classification of the applicant
- Paid once a month at the end – payroll cycle



BENEFITS

Benefit Type	Employee Cost (Monthly)	Employer Cost (Monthly)
Health Insurance (FloridaBlue PPO or HMO)	\$8.34 for single \$30.00 for family	\$755.46 for single \$1,689.32 for family
Life Insurance		\$3.58
Long-Term Disability Insurance & Employee Assistance Program		\$0.00099 * monthly salary
Dental Insurance		\$31.24 for single \$101.44 for family
Retirement	3% contribution	10% of salary
Deferred Compensation through DFS		
DMS Pre-Tax Benefit Plan		



BENEFITS

Leave	Accrual	Payout
Annual Leave	11 hours/mo. – up to 5 yrs. svc. 13 hours/mo. – 5-10 yrs. svc. 15 hours/mo. – 10 yrs. svc.	Payout if employee is qualified at time of separation/ Payout capped
Sick Leave	9 hours/mo.	Payout if employee is qualified at time of separation/ Payout capped
Comp Time	Can be accrued upon approval of Speaker & supervisor/Capped	
Personal Holiday	Calendar Year	
12 Paid Holidays		



SPEAKER APPROVAL

- Must have Speaker's approval before a new employee can begin employment
- Must have Speaker's approval and authorization before there is an involuntary separation in employment
- Employees are employed by the Speaker; however, the member is the employee's supervisor



OPS (OTHER PERSONNEL SERVICES)

- Must have Speaker approval before start of employment
- Wages & taxes will be deducted from the member's next IDA allotment (unless current vacancy) – critical to budget
- Generally no benefits & paid hourly (unless working 30+ hours and working longer than 6 months)
- Biweekly timesheet
- Must be supervised at all times
- House email account; does not have House equipment or business cards



DISTRICT OFFICE FINANCES

House General Fund

Intradistrict Expense Allowance Account (IDA)



HOUSE GENERAL FUND

- Requires prior authorization by the Speaker for all expenditures
- Committee Meetings
 - Members and 1 designated district staff authorized to travel and reimbursed for travel expenses by memo from Office of House Administration
- Session
 - Members and 1 designated district staff authorized to travel and reimbursed for travel expenses by memo from Office of House Administration
- Conference/Training or other legislative travel
 - (whether in state or out-of-state) by submitting travel authorization request to House Administration



INTRADISTRICT EXPENSE ALLOWANCE ACCOUNT (IDA)

- How much is it? \$39,534/year for allowable expenses
- Member must set up their own checking account at his/her banking organization of choice using their social security number
- Because it is a personal account, not exempt from sales tax.



IDA

- Distributed in 12 monthly allotments which will vary. November's allotment of \$5,500 followed by approximately of \$3,094 with deductions for OPS staff, Office Depot purchases, bulk rate postage and printing, and with additions for rollover of refunded amounts
- Monthly allotments will be in the form of checks mailed to the member's home address or the district office once established. Once the checking account is created, a request for direct deposit can be submitted to DFS F&A
- Member's staff must budget and anticipate deductions in the allotment for bulk rate postage, OPS, Office Depot purchases



IDA

- Governed by the IRS as an Accountable Plan for office expenses permitted by the Internal Revenue Code and approved by the House of Representatives
- Quarterly reporting until summer, 2021; Monthly reporting to your assigned OLS accountant via an electronic reporting system
- Amounts not used in the month/quarter must be refunded back to the House. Those amounts can be rolled forward at the next monthly allotment after approval of the IDA report by the OLS accountant



IDA

- Non compliance with reporting will result in future allotments being withheld
- The report must reference check book records and bank statements
- Every expense or deposit listed on a bank statement must be listed on the report



IDA ALLOWABLE EXPENSE CHART

- Every allowable expense must have supporting documentation in the form of receipts, invoices, and travel vouchers
- Can be used for:
 - Rent
 - Water
 - Electricity
 - Travel by member and staff not paid from General House funds
 - Mass communications
 - Expenses related to business meetings/town halls
 - Dues
 - Insurance for specific situations



IDA

- Office supplies – contract with Office Depot
- Subscriptions
- OPS staff approved by the Speaker – prior month will be deducted from the following allotment. Cannot be paid directly from IDA. Budgeting is important. An estimate of the cost of the OPS with taxes and potentially health insurance will be given to member at the time of hire
- Ticketed events – an event usually hosted by a professional or civic organization for a meal and has a legislative business purpose. 50% of the cost may be purchased or reimbursed from the IDA.
- Other approved legislative business purposes



IDA MEETING INFORMATION SHEET

- Expenses associated with hosting a meeting, town hall, or other event to be paid or reimbursed from the IDA, must be approved PRIOR to the event by submitting a Meeting Information Form through the Intradistrict Reporting System or the expenses may not be approved.



ALLOWABLE TRAVEL EXPENSES

- Transportation costs
 - Airfare – most economical method
 - Car Rental – Avis state term contract
 - Taxis
 - Personal Vehicle mileage
- Incidental costs – tolls/parking/portage
- Lodging & Meal Allowance or State Per Diem rate (\$80)



ALLOWABLE TRAVEL EXPENSES

Per Diem OR Lodging and Meal Allowance

Per Diem (\$80.00 per day (\$20.00 per clock quarter))

OR

Lodging (single rate)

Tallahassee – not to exceed \$110 per day

and

Meal Allowance - \$36.00 per day (\$6 breakfast/\$11 lunch/ \$19 dinner)



TRAVEL REIMBURSEMENT

- General House travel (committee weeks/session/training) will be processed by filing reimbursements through the online travel system
- Travel reimbursed or funded by the IDA will be substantiated for reporting by completing the Intradistrict Travel Form with all applicable documentation into the online Intradistrict Reporting System



TRAVEL . . .

- All out-of-state travel seeking reimbursement from IDA must be prior-approved by the Speaker
- Offers from third parties to pay travel expenses needs to be reviewed by the Office of General Counsel



HOUSE COMPELLED TRAVEL

- Session

Allocated session subsistence at \$163 per day for the member and one designated district staff paid by General House for every day in Tallahassee

Member is allowed to be reimbursed for weekly trips home to district during session but if completely personal, then trip expenses taxable & won't be fully reimbursed
Designated district staff is allowed two trips home to district during session

- Committee Weeks

Member and one district staff paid by General House

Can receive actual expenses (up to \$110.00 + tax) and meal allowance **or** \$80 per diem



FREQUENTLY ASKED QUESTIONS

- Can I purchase frames, souvenir coins or flags as constituent tributes?
No. Items purchased with IDA funds become state property and cannot be given away.
- Can I purchase the house panoramic photo, member pin or pay for the page & messenger program from IDA?
No, these are considered personal items.
- Can I be reimbursed mileage to a funeral for a constituent?
No, funerals are considered personal and associated expenses cannot be reimbursed.
- Can I purchase food and drinks for an office event?
Per House policy, no alcohol and reasonable expenses for snacks or finger foods and drink (no catered events)



OLS ACCOUNTANT

You will be assigned an OLS accountant

Districts 1-80: Fran Keyes
 850.717.0366
 Keyes.fran@leg.state.fl.us

Districts 81-120: Valery Meeks
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